



Data Warehouse Purchasing Dashboard

March 31, 2011

Data Warehouse Purchasing Dashboard



- SCM - PROC - KS Purchase Orders
 - Data extracted nightly
 - Data is based on Purchase Orders information in SMART
 - Data available is based on PO Business Unit security
- SCM - PROC - KS P-Card
 - Data extracted nightly
 - Data is based on P-Card information in SMART, including limited PO and voucher information, where applicable
 - Data available is based on P-Card Holder Business Unit security

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KS Purchase Order Subject Area



- Potential uses for KS Purchase Order Subject Area
 - Total Purchase Order Amount by ChartField
 - Purchase Orders by Vendor
 - Purchase Orders by Buyer
 - Purchase Orders by Contract ID
 - Purchase Orders by Item
- Statewide Purchasing Dashboard has been developed as a starting point

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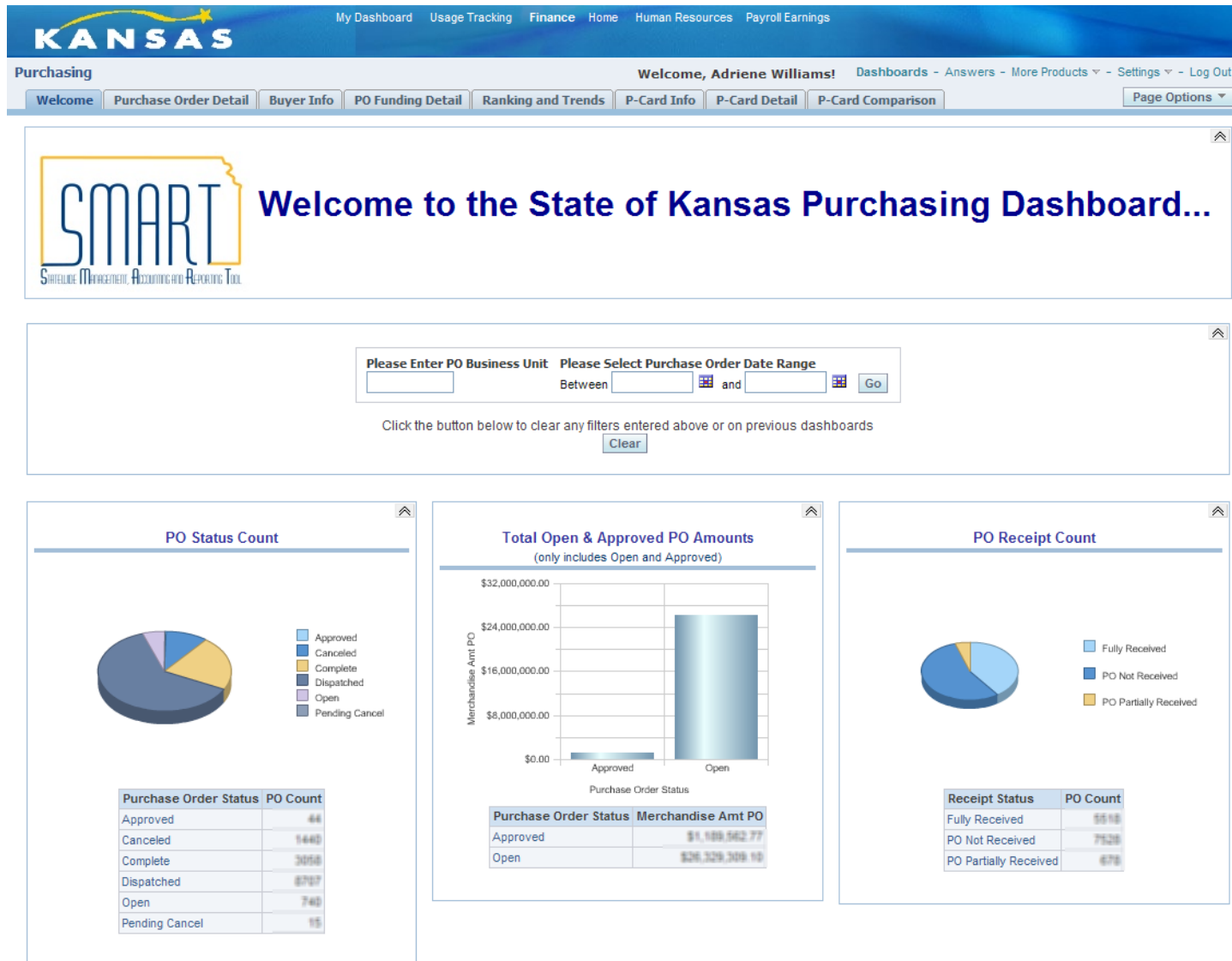
KS P-Card Subject Area



- Potential uses for KS P-Card Subject Area
 - P-Card transactions by PO
 - P-Card transactions by Status
 - P-Card transaction by Amount
 - P-Card transaction Amounts by Employee
 - P-Card transaction by Voucher
- Statewide Purchasing Dashboard has been developed as a starting point

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Purchasing Dashboard – Welcome



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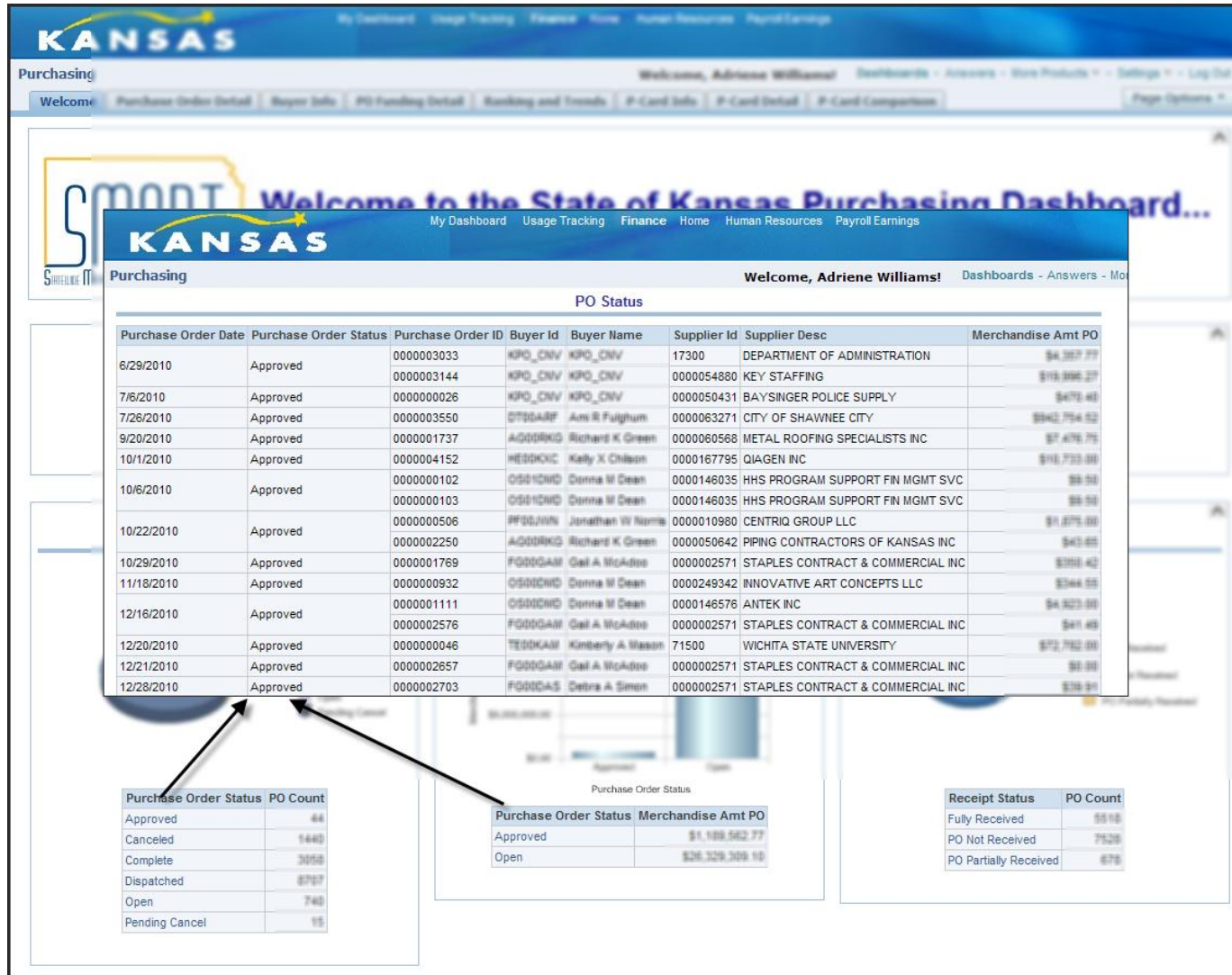
Purchasing Dashboard – Welcome



- PO Status Count
 - Provides the count of purchase orders in each Purchase Order Status
- Total Open & Approved PO Amounts
 - Provides the total Merchandise Amount PO (from PO distribution line) for all purchase orders in either OPEN or APPROVED Purchase Order Status
- PO Receipt Count
 - Provides the count of purchase orders in each Receipt Status

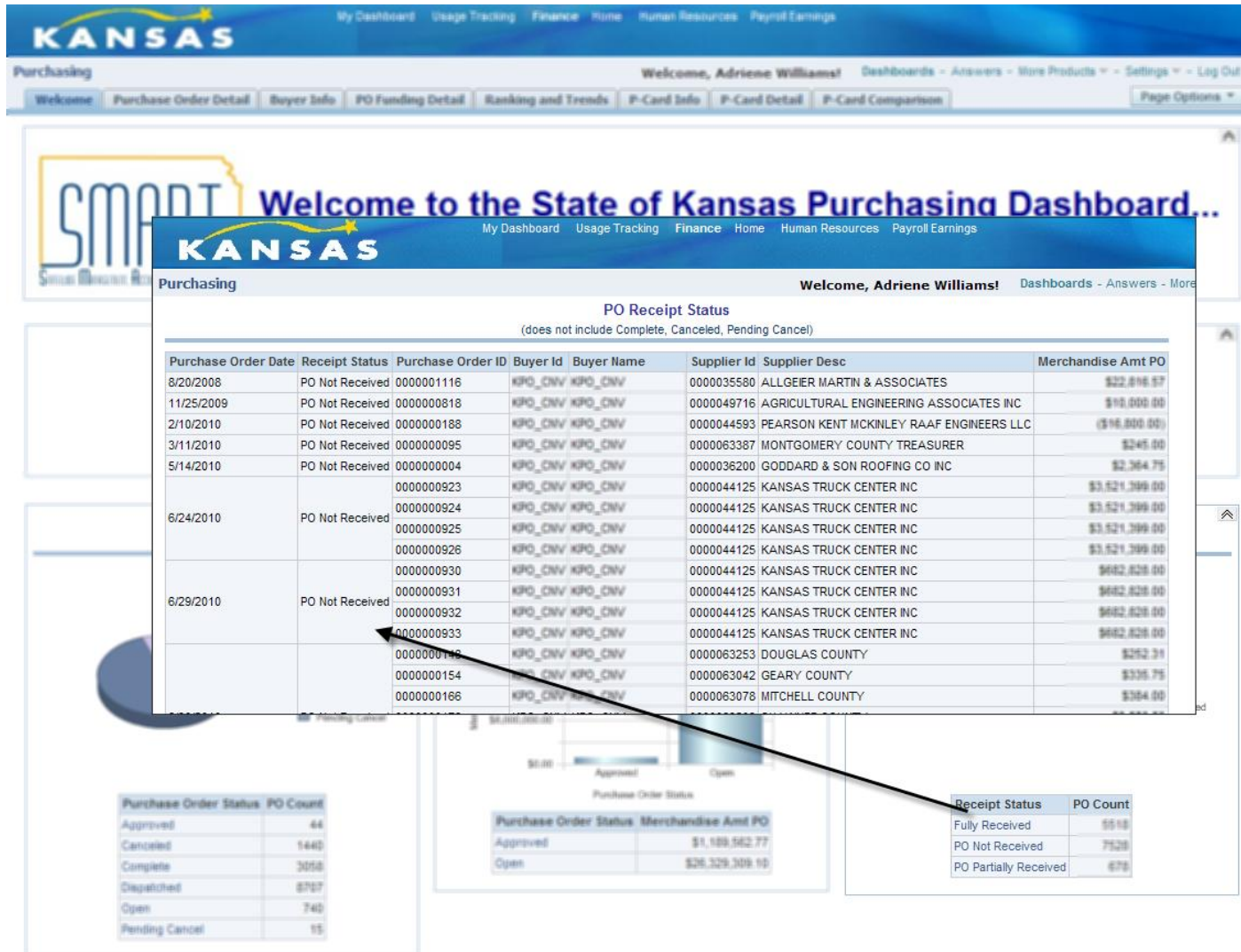
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Purchasing Dashboard – PO Status



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Purchasing Dashboard – PO Receipt Status



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Purchasing Dashboard – PO Status




- PO Status
 - This request is a detailed combination of the PO Status Count and Total Open & Approved PO Amounts requests. To get to this request, click on the Purchase Order Status from either request
 - This provides the Merchandise Amount PO based on the Purchase Order Status from the previous requests along with the Purchase Order Date, Purchase Order ID, Buyer and Supplier
- PO Receipt Status
 - This request is a detailed version of the PO Receipt Count request. You can get to this request by clicking on a Receipt Status
 - This provides the Merchandise Amount PO based on the Receipt Status, Purchase Order ID, Buyer and Supplier

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Purchasing Dashboard – Purchase Order Detail





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Please Enter PO Business Unit

Please Select Purchase Order Date Range
 Between and

Please Select PO Status

Please Select Receipt Status

Please Select Buyer ID

Click the button below to clear any filters entered above or on previous dashboards

PO Status

Purchase Order Date	Purchase Order Status	Purchase Order ID	Buyer Id	Buyer Name	Supplier Id	Supplier Desc	Merchandise Amt PO
11/21/2001	Dispatched	0000002549	KPO_CNV	KPO_CNV	0000063618	CITY OF LENEXA	\$541,507.69
3/8/2002	Dispatched	0000002538	KPO_CNV	KPO_CNV	0000063241	CITY OF KANSAS CITY, KANSAS	\$35,362.86
12/26/2002	Dispatched	0000002539	KPO_CNV	KPO_CNV	0000049778	J A G CONSTRUCTION CO	\$2,785.31
5/5/2003	Dispatched	0000000290	KPO_CNV	KPO_CNV	0000055911	CHASE LAW FIRM LC	\$1,724.01
7/25/2003	Dispatched	0000002550	KPO_CNV	KPO_CNV	0000063734	CITY OF OVERLAND PARK	\$83,222.69
10/13/2004	Dispatched	0000000984	KPO_CNV	KPO_CNV	0000063020	CITY OF SALINA	\$1,289,799.32
11/24/2004	Complete	0000002556	KPO_CNV	KPO_CNV	0000062930	CITY OF HAYS	\$945.99
1/7/2005	Dispatched	0000002563	KPO_CNV	KPO_CNV	0000058949	UNIFIED GOVT OF WYANDOTTE COUNTY	\$916,489.85
4/22/2005	Dispatched	0000002575	KPO_CNV	KPO_CNV	0000048216	MIDWEST CONSTRUCTION CO INC	\$4,400.64
						DEPARTMENT OF	

PO Receipt Status

(does not include Complete, Canceled, Pending Cancel)

Purchase Order Date	Receipt Status	Purchase Order ID	Buyer Id	Buyer Name	Supplier Id	Supplier Desc	Merchandise Amt PO
8/20/2008	PO Not Received	0000001116	KPO_CNV	KPO_CNV	0000035580	ALLGEIER MARTIN & ASSOCIATES	\$22,816.57
11/25/2009	PO Not Received	0000000818	KPO_CNV	KPO_CNV	0000049716	AGRICULTURAL ENGINEERING ASSOCIATES INC	\$10,000.00
2/10/2010	PO Not Received	0000000188	KPO_CNV	KPO_CNV	0000044593	PEARSON KENT MCKINLEY RAAF ENGINEERS LLC	(\$16,800.00)
3/11/2010	PO Not Received	0000000095	KPO_CNV	KPO_CNV	0000063387	MONTGOMERY COUNTY TREASURER	\$245.00
3/19/2010	PO Partially Received	0000000790	KPO_CNV	KPO_CNV	0000018727	T S CONSTRUCTION	\$17,381.26
5/14/2010	PO Not Received	0000000004	KPO_CNV	KPO_CNV	0000036200	GODDARD & SON ROOFING CO INC	\$2,364.75
5/25/2010	PO Partially Received	0000000047	KPO_CNV	KPO_CNV	0000035556	PROGRESSIVE ELECTRONICS	\$1,352.85
						BETTIS ASPHALT	

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Purchasing Dashboard – Purchase Order Detail




- PO Status
 - Lists the Monetary Amount of a POs by Purchase Order Date, Purchase Order ID, Buyer, Supplier and Purchase Order Status
- PO Receipt Status
 - Provides the Monetary Amount of a PO by Purchase Order Date, Receipt Status, Purchase Order ID, Buyer and Supplier
 - This does not include POs that have a Complete, Canceled or Pending Cancel Purchase Order Status
 - Only PO lines are marked as “Receiving Required” are displayed

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Purchasing Dashboard – Buyer Info




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Please Enter PO Business Unit
Please Select Purchase Order Date Range
Please Select Buyer ID

Between and

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Buyer PO Count

Buyer Id	Buyer Name	Purchase Order Status	PO Count
A000A3X	Alicia X Kraft	Complete	5
		Canceled	2
A000SES	Sarah E Salzman	Complete	5
		Dispatched	5
		Canceled	8
A000RKG	Richard K Green	Complete	61
		Dispatched	152
A000EAV	Elizabeth A Vancosky	Complete	5
A000JKE	Jana K E Knubyski	Complete	12
		Dispatched	11
B000AXS	Amanda X Sprengeler	Canceled	10
		Complete	35
B000RJB	Michael J Benson	Dispatched	12
		Complete	1
		Canceled	8

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Purchasing Dashboard – Buyer Info



- Buyer PO Count
 - Provides the count of purchase orders in each Purchase Order Status by Buyer
 - The Purchase Order Date prompt on this dashboard page has a default date of 7/1/2010-7/31/2011 to limit the results. The prompt can be updated

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Purchasing Dashboard – PO Funding Detail



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Please Enter PO Business Unit

Please Select Buyer ID

Please Select Purchase Order Status

Please Select Purchase Order Date Range
Between and

Please Select Purchase Order ID

Please Select Supplier ID

Go

Click the button below to clear any filters entered above or on previous dashboards

⌵

PO Funding Details														
Purchase Order Status	Purchase Order Date	Purchase Order ID	PO Line Number	Distribution Line	Buyer Id	Buyer Name	Supplier Id	Supplier Desc	Department	Fund	Budget Unit	Program	Account	PO Amount
Canceled	2/1/2011	0000000055	1.00	1.00	YL00 RJM	Robert J Manry	0000151754	BUD DUNKLIN SALES	4120560000	1000	0303	56000	530100	\$88.00
			2.00	1.00	YL00 RJM	Robert J Manry	0000151754	BUD DUNKLIN SALES	4120560000	1000	0303	56000	530100	\$264.00
		0000000055 Total												\$352.00
Dispatched	2/1/2011	0000000054	1.00	1.00	YL00 RJM	Robert J Manry	0000002571	STAPLES CONTRACT & COMMERCIAL INC	4120560000	1000	0303	55000	537100	\$276.45
		0000000054 Total												\$276.45

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Purchasing Dashboard – PO Funding Detail



- PO Funding Details
 - This is the detailed request for the Buyer PO Count request and can be navigated to by clicking on the Buyer PO Count Request. The request is based on the Buyer Id selected
 - This provides the Monetary Amount for a PO based on PO Status, Purchase Order Date, Purchase Order ID, Purchase Order Line, Purchase Order Distribution Line, Buyer, Supplier and Chartfields

A vibrant yellow sunflower with a dark brown center is in sharp focus in the foreground. Behind it, another sunflower is partially visible. The background shows a green field under a dramatic, cloudy sky.



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Please Enter PO Business Unit

Please Select Purchase Order Date Range

Between



a

nd



Clear

"Merchandise Amt PO" will include POs where the Budget Date has been modified to reflect prior fiscal year funding.

Top 20 Category Codes

Top 20 Vendors

Top 20 Contracts

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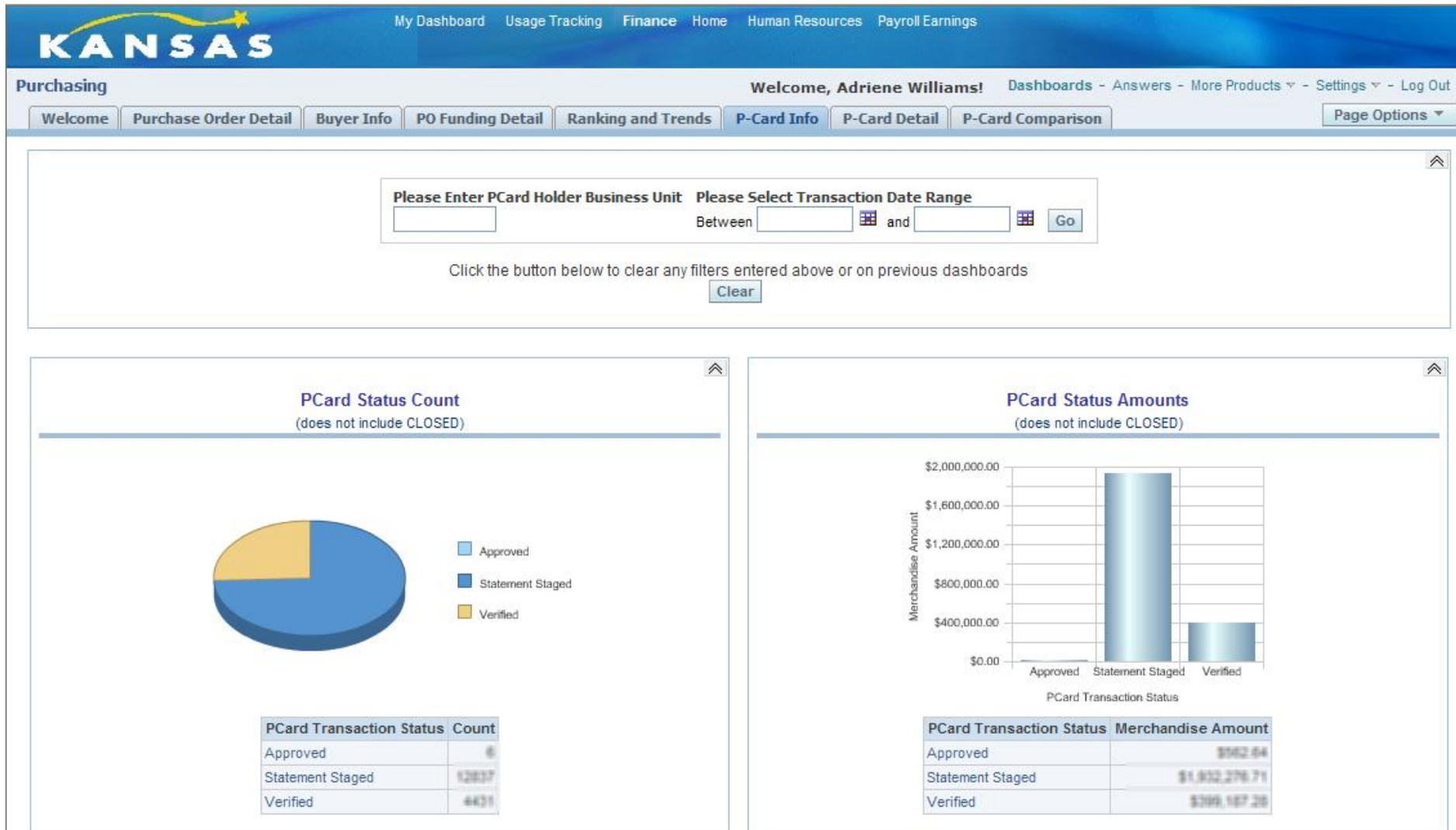
Purchasing Dashboard – Ranking and Trends



- Top 20 Category Codes
 - This ranks the top 20 category codes used on purchase orders based on the Merchandise Amount PO
 - Category code CONVERSION is not included
- Top 20 Vendors
 - This ranks the top 20 vendors (Suppliers) used on purchase orders based on the Merchandise Amount PO
- Top 20 Contracts
 - This ranks the top 20 Supplier Contracts used on purchase orders based on Merchandise Amount PO

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Purchasing Dashboard – P-Card Info



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Purchasing Dashboard – P-Card Info



- P-Card Status Count (does not include CLOSED)
 - Provides the count of P-Card transactions by P-Card Transaction Status (excluding CLOSED status)
- P-Card Status Amounts (does not include CLOSED)
 - Provides the Merchandise Amount (from P-Card distribution line) of P-Card transactions by P-Card Transaction Status (excluding CLOSED status)

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Purchasing Dashboard – P-Card Detail



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Please Enter PCard Holder Business Unit
Please Choose Transaction Date Range
Please Select Transaction Status

Click the button below to clear any filters entered above or on previous dashboards

Clear

PCard Status Detail

PCard Holder Business Unit Source Id	Transaction Day Date	Control Account	Transaction Number	Transaction Line Number	Transaction Sequence Number	Transaction Dist Line Number	Transaction Status	Merchant	Merchant Category Code	Merchandise Amount
02800	2/7/2011	4715622020000007	24036211030624151072325	0.00	3.00	1.00	Statement Staged	SOUTHWESTAIR 5262153582664	03066	\$289.40
			24036211030624151072325 Total							\$289.40
	2/7/2011	4715622020000007	24717051030600362904622	0.00	1.00	1.00	Statement Staged	AGENT FEE 8900532209316	04511	\$26.50
			24036211030624151072325 Total							\$26.50
	2/8/2011	4715622020000007	24036211030624151072325	0.00	2.00	1.00	Statement Staged	SOUTHWESTAIR 5262153793514	03066	\$266.10
			24036211030624151072325 Total							\$266.10
	2/8/2011	4715622020000007	24036211030624151072325	0.00	1.00	1.00	Statement Staged	AGENT FEE 8900532209465	04511	\$26.50
			24036211030624151072325 Total							\$26.50
	6/16/2010	4715622034000009	24036211030624151072325	0.00	1.00	1.00	Closed	ENVISIONXPRESS.COM	05111	\$100.95
			24036211030624151072325 Total							\$100.95

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Purchasing Dashboard – P-Card Detail



- P-Card Status Detail
 - This request can be navigated to by either the P-Card Status Count or P-Card Status Amounts request. When navigating from either request, the Transaction Status is inherited
 - Provides the Merchandise Amount (from P-Card distribution line) based on Transaction Date, Control Account, Transaction Number, Transaction Line Number, Transaction Sequence Number, Transaction Dist Line Number, Transaction Status and Merchant

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Purchasing Dashboard – P-Card Comparison



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Please Enter PCard Holder Business Unit
Please Select Control Account
Please Select Purchase Order ID
Please Select Transaction Number
Go

Click the button below to clear any filters entered above or on previous dashboards
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Compare PCard to PO Transaction Amount

PCard Holder Business Unit Source Id	Control Account	Transaction Number	Purchase Order ID	PO Line Number	Merchandise Amount
		24013390236000031199181	0000001248	1.00	\$975.00
		24013390251000582111478	0000001248	1.00	\$106.97
		24013390293002157260201	0000002649	1.00	\$009.75
		24013390302002489609462	0000003425	1.00	\$40.41
		24013390306002671024757	0000003249	1.00	\$00.95
		24013390308002749527250	0000003244	1.00	\$2.04
		24013390309002810360029	0000003226	1.00	\$16.97
		24013390321003319483489	0000003245	1.00	\$7.08
		24013390323003411425626	0000002897	1.00	\$43.32
		24013390323003411425634	0000002896	1.00	\$119.96
		240133903240034489991259	0000003321	1.00	\$150.99
		24013390328003631099610	0000003872	1.00	\$37.18
		24013390328003631099620	0000003873	1.00	\$270.00
		24013390329003680352457	0000003874	1.00	\$115.00
		24013390334003881943154	0000003361	1.00	\$1,410.00

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Purchasing Dashboard – P-Card Comparison



- Compare P-Card to PO Transaction Amount
 - Provides the Merchandise Amount (from P-Card distribution line) based on the Control Account, Transaction Number, Purchase Order ID and PO Line Number

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Purchasing Dashboard – P-Card & PO Amounts



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P-Card and PO Amounts

This request is based on two separate requests coming from the SCM-PROC-KS P-Card and SCM-PROC-KS Purchase Orders subject areas using the "Combine with Similar Request" functionality. The PCard Transaction Number and PCard Merchandise Amount come from the KS P-Card subject area. The Purchase Order ID, PO Line Number, and PO Merchandise Amount come from the KS Purchase Order subject area.

PO Business Unit Source ID	PCard Transaction Number	Purchase Order ID	PO Line Number	Merchandise Amount	
				PCard	PO
03400	24013390324003448991259	0000003321	1.00	\$150.99	
	NA	0000003321	1.00		\$150.99

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03400	4719622834000000	240133903200024003448991259	0000003425	1.00	\$40.41
		24013390308002671126757	0000003249	1.00	\$50.95
		24013390308002749527550	0000003244	1.00	\$2.04
		2401339030900281036092	0000003228	1.00	\$16.97
		24013390321003319483489	0000003245	1.00	\$7.98
		24013390323003411425626	0000002997	1.00	\$43.32
		24013390323003411425634	0000002996	1.00	\$119.98
		24013390324003448991259	0000003321	1.00	\$150.99
		24013390328003631099610	0000003872	1.00	\$37.18
		24013390328003631099628	0000003873	1.00	\$276.98
		24013390329003688352457	0000003874	1.00	\$115.98
		24013390334003681943154	0000003361	1.00	\$1,410.98

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Purchasing Dashboard – P-Card & PO Amounts



- P-Card and PO Amounts
 - This is navigated to from the Compare P-Card to PO Transaction Amount request
 - This request is based on two separate requests coming from the SCM-PROC-KS P-Card and SCM-PROC-KS Purchase Orders subject areas using the "Combine with Similar Request" functionality. The P-Card Transaction Number and P-Card Merchandise Amount come from the KS P-Card subject area. The Purchase Order ID, PO Line Number, and PO Merchandise Amount come from the KS Purchase Order subject area

Data Warehouse Resources



- Sunflower Project website:
<http://www.da.ks.gov/smart/>
- Sunflower Infolist
 - Subscribe at <http://www.da.ks.gov/gov/listserv.htm>
- SMART Help Desk
 - Search the SMART Solutions Knowledgebase at <https://dahelpdesk.ks.gov/sd/SolutionsHome.sd>
 - Log in to Service Desk at <https://dahelpdesk.ks.gov/>
 - Call 785-368-8000, Select Option 2